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Making creative industries policy in the real world: differing configurations of the culture-market-state nexus in the UK and South Korea¹

Abstract:

This paper compares creative (content) industries policies in the UK and South Korea, highlighting the coevality in their development. Seeing them as ‘industrial policies’, it focuses on *how state intervention is justified* and *why a certain set of policy options have been chosen*. The UK policy makers prefer passive and decentralised roles of the state that addresses market failures via generic and horizontal policies. Meanwhile, Koreans have consistently believed in the strong, resourceful and ambitious state in developing centralised, sector-specific policies for cultural industries. While demonstrating two contrasting approaches to the nation state’s management of cultural turn in the economy, both cases seems to present a ‘paradox’. Despite its neoliberal undertone, the horizontal and fused approach taken by the UK’s creative industries policy engenders some space for ‘cultural’ policy. On the contrary, the non-liberal and state-driven content industries policy in Korea has shown a stronger tendency of cultural commodification.

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Is there a script for creative industries policy?

The existing literature on creative industries policy shows notable Anglo (UK)-centrism, which asserts a certain spatial and temporal structure in our understanding of the policy, that can be summarised as ‘first in the West, and then elsewhere’ (Chakrabarty 2000: 6; O’Connor and Gu 2006). This is reinforced by writings on policy mobility and transfer, despite the authors’ emphasis on local conditions and agendas (Karvelyte 2017; Kong et al 2006; Pratt 2009; Prince 2010). The popular narrative is that the policy, as an invention of the UK cultural ministry inspired by Australia’s *Creative Nation* report (1994), has been adopted by many countries with substantial twists. Focusing on the rise of cultural/creative industries policies in Asia and conceptualising the intensification of the culture-economy interface with the term ‘creative economy’, Lily Kong and her colleagues (2006) observe the emergence of ‘a normative policy script’ deriving from the Western discourse and its modification by Asian policy makers. According to them, the script is: ‘to compete in the new creative economy, cities should seek to implement particular initiatives: encourage creative industry clusters, incubate learning and knowledge economies, maximise networks with other successful places and companies, value and reward innovation and aggressively campaign to attract the “creative class” as residents’ (p. 173). Yet, their analysis of the ‘actual policies’ indicates that the idea (such as ‘creative industries’ and ‘creative economy’), rather than a specific policy script, have been taken up by many local policy makers.

In this context, the creative industries idea can be seen as a ‘global form’ (Prince 2010), which is an abstract and transferrable construct that conveys ‘animating vision of the future’ (O’Connor 2019: 1) and integrated into existing policy agenda and strategies. This implies that there is no such thing as general model or template for creative industries policy (Pratt 2009): the policy is moulded under local conditions such as identified problems, available ideas, the national mood, change of government, and dramatic events (Volkering 2001). For instance, Thailand and Malaysia – facing severe economic problems caused by the 1997 Asian financial crisis– felt an urgent need for economic recovery and looked for a new language that could capture their post-industrial economic ambition. The consequence is the rise of creative industries policies, which are heavily geared towards digital industries, SME sectors and even rural development (Barker and Lee 2018; Parivudhiphongs 2016). Here, we can see the rise of ‘a plurality of strategies’ under the

general rubric of creative industries (Flew 2012: 33), which chimes with the argument that the construct of creative industries works as a ‘Roscharch’s blot’ conjuring up multiple imaginations (Cunningham 2009). Such understanding is criticised for unseeing the neoliberal implications articulated in the Western idea of creativity and thus only limited plurality available for local strategies (McRobbie 2016; O’Connor 2019). Yet, another issue which this paper concerns with more is that the creativity idea is anchored at a single locale (UK) and is endowed with universality whilst the (limited) plurality emerges only when it travels beyond the UK. As such, our knowledge of the policy seldom escapes from the thinking of ‘western theory [concept] and non-western derivative experience’ (Iwabuchi 2014: 46) despite the endeavours to discuss the particular logic of creative industries and their socioeconomic ecology in ‘other locales’, for example China (Keane 2013; Karvelyte 2017; O’Connor and Gu 2006; Wang 2004).

This paper compares state policy on creative industries in the UK and its equivalent in South Korea.² Currently, many writings stressing the mobility of policy from the UK to elsewhere tend to be rather vague about what the UK’s ‘actual policy’ on creative industries looks like and why it does. Similarly, critical commentaries on the ideological implications seldom explore details of the policy as they see it as a decentralised and dispersed discursive exercise in relation to life/work of cultural producers (e.g., McRobbie 2016). Meanwhile, my point for departure is ‘provincialising’ the policy development in the UK by elaborating its distinctive configuration of the relationship between cultural market economy and the state. ‘Creative industries’ is one of many ideas that advocate the cultural turn in economy but has not been notably successful in entering South Korea where the notion of ‘content industries’ is preferred and a ‘statist’ view of cultural industries development proliferates. I see policy development in these two countries as having been a locally specific phenomenon, in which the idea of creativity (or content) is understood in a certain way and has been incorporated into locally defined policy rationale and inventory of policy instruments. What we then find is two coeval but dissimilar – even contrasting – formations of the nexus between culture, the market and the state. Policy encompasses idea, substance and process, and its making involves a wide range of activities taking place at various stages. Thus providing its full account is beyond the scope of this paper. Instead, my analysis will be confined to two areas which

² According to the UK government’s Creative Industries Mapping Documents (1998, 2001), creative industries include advertising, architecture, arts, craft, design, fashion, film, leisure, music, performing arts, publishing, software, and TV and radio. Content industries in Korea refer to a wide range of commercial business relying cultural content: from broadcasting, film, publishing, comics, animation, games to mobile content and character industry.

determine the basic shape of the policy: *how state intervention in creative (content) industries is justified and why a certain set of policy options have been preferred and chosen.*

As for the UK's experience, I will draw on policy documents at two key moments: the New Labour government's 'Creative Economy Programme' (2006) resulting in the publication of its green paper *Creative Britain: New Talents for the New Economy* (2008); and the 2014-18 period leading to the inclusion of creative industries in the Conservative government's 'industrial' strategy. Meanwhile, being closely associated with the current success of the 'Korean Wave' phenomenon (the global popularity of Korean cultural commodities), South Korean content industries policy attracts increasing academic and media attention (Chung 2012; Jin 2014; Kwon and Kim 2014; Lee 2018: Chapters 5 and 6). Being a 'state policy', it has been consistently expanding since the late 1990s and early 2000s, when its legal foundation was laid and core structure was established regardless government changes. I will analyse its features by referring to key documents and programmes, and then comment on the quick rise and fall of so-called 'creative economy policy' under Park Geun-Hye's presidency, as a one-off 'government policy'.

From cultural to industrial policy

Despite the unceasing debate on 'sectorisation' of creative industries (O'Connor 2010; Pratt 2009; Throsby 2008; Volkering 2001), the existing mapping exercises indicate that the broader cultural sector, especially *cultural industries*, is the core of the discussion and, hence, the primary object of creative industries policy. Traditionally, cultural policy legitimised state intervention from the perspective of artistic excellence, cultural equity and diversity, social cohesion and heritage preservation. While the arts and heritage were its main objects, commercial cultural businesses were, by and large, left to market forces and subject to 'general' (rather than 'cultural') policies such as those on competition, tax and trade. A notable exception is the film industry: both UK and Korean governments developed specific policies and provided systematic public investment to boost domestic production, regarding film as a crucial medium for national cultural expression, which was threatened by popular American films. The distinct status of film is still evident. In the UK, this is the only cultural industry where sector-specific support policies are available (BEIS 2018; BIS 2010). Film policy in Korea has been coherently carried out by a single agency – Korean Film Promotion Corporation (1973-1999) and Korean Film Council (1999-present) – while all other cultural industries, from comics and TV shows to musicals, are under the remit of KOCCA (Korea Creative Content Agency).

Creative industries policy – or content industries policy in the case of South Korea – explicitly aims to develop ‘the market economy of culture’ and enhance its international competitiveness. It is debatable if it is a new sub-set of cultural policy as I find in the Korean case (Lee 2018: Chapter 5), or a commodified form of cultural policy per se, where the arts are disappearing as British writers argue (Oakley 2009). In either case, its status is ambivalent: it is rooted in ‘cultural’ policy in terms of origination and the identity of key actors but, at the same time, it *is* an ‘industrial’ policy in terms of its rationale and means. For example, it is revealing that the UK’s cultural industries themselves lobbied the government for their inclusion in state ‘industrial’ policy. The Creative Industries Council, the joint forum between creative industries and government, published its own ‘industrial strategy’ document *Create UK* based on ‘the same principles adopted by the government’s industrial programme’ (p. 2) and argued that:

[g]overnment should now make the creative industries one of its official industrial strategy sectors to build on this UK success story (Creative Industries Council 2014: 2).

Similarly, the Department of Business, Innovation and Skills sees creative industries as one of the UK’s successful sectors where it can identify the roles played by the state for industrial development (BIS 2010). After all, the UK government decided to include creative industries in its ‘industrial strategy’ in March 2018 (BEIS 2018). In the case of Korea, the broad consensus is that, as a distinct sub-set of cultural policy, cultural industries policy requires the logic of industrial policy (Lee 2018: Chapter 5).

Industrial policy is difficult to define and can be understood in different ways. We can consider two different positions. The first is that industrial policy

involves the government’s use of its authority and resources to...address the needs of specific sectors and industries (and, if necessary, those of individual companies) with the aim of raising the productivity of factor inputs (Okimoto 1989: 8).

Such understanding excludes general economic policies that falls into the domain of macroeconomics. Similarly, Chang (1996: 60) argues that industrial policy ‘aims at *particular* industries (and firms as their components) to achieve the outcomes that are *perceived by the state* to be *efficient* for the economy as a whole’ (original emphasis). Here, ‘policies designed to affect both particular regions and particular groups in the labour market’ are not considered as industrial policy.

Korea's industrial strategy, especially during the rapid industrialisation period, neatly fit with the above definitions. It has a clear target of select industries, focuses on their growth and export, and is led by industry-specific plans and implementation strategies. This explains why policy makers see it as normative to develop a centrally managed content industries policy that is distinguished from labour market or urban regeneration policies, although there are some overlaps.

Meanwhile, the other view, which is generally taken by UK policy makers, understands industrial policy more broadly:

‘Industrial policy’ is...public sector intervention aimed at changing the distribution of resources across economic sectors and activities. Thus industrial policy includes both ‘horizontal’ policies which focus on activities such as innovation, provision of infrastructure etc. while ‘selective’ policies aim to increase the size of particular sectors (BIS 2010: 3).

The UK government prefers ‘horizontal’ policies and believes that ‘[t]he case for selective industrial policies has always been more controversial’ (p.3). Regarding the pre-1980s’ sector-specific policies (which were driven by direct interventions by the state such as nationalisation) as ineffective and also embracing neoliberal thinking that the market is the best coordinator for resource allocation, policy makers are inclined to rely on horizontal and indirect policies even when developing policies for specific industries, such as creative industries. The horizontal policy essentially is a ‘fused policy’, as it is dispersed across different policy domains such as education, labour markets, regional development and urban regeneration policies and, consequently, addressing a wide range of different agendas.

Referring to the tendencies of regionalism and decentralisation, Hesmondhalgh and his colleagues (2015: 102) point out the difficulty in identifying ‘actual policies’ for creative industries in the UK. The policy’s fused character and its dispersal to the private sector, too, make it elusive. Compared with Korea’s industry-specific counterpart, it is more difficult to evaluate as it touches on heterogeneous areas and its effects are diffused. An interesting point to note is that even if policies fail to increase cultural industries’ competitiveness, it can still generate desirable impacts in terms of offering cultural education opportunities, providing new regional infrastructure, refreshing the image of city, social inclusion and so on (Pratt 2009). This makes the policy, which targets high-risk cultural enterprises facing uncertain market demands, relatively a ‘safe’ domain which would generate some positive outcomes anyway.

State intervention: correcting market failures, or creating markets?

Creative industrial policy reflects policy makers' views on roles of the state vis-à-vis the operation of market forces in boosting the capacity, productivity and global competitiveness of national industries. However, the views are not unitary. While the liberal perspective sees the market as mostly self-governing and calls for a small state fixing market failures, there is a contrasting view highlighting the embeddedness of the market in state policy (Polanyi 2011[1944]) and expects that the state 'can' and 'should' play pivotal roles in facilitating the development of a capitalist market economy (Chang 1996; Mazzucato 2013). Broadly guided by the liberal view, UK policy makers show strong confidence in the operation of market forces, as hinted by the rhetoric such as 'They [creative industries] are a real success story, and a key element in today's knowledge economy' (DCMS 2001: 3), 'the UK's place as world leader for the creative industries' (CIC 2014: 4)' and 'The creative industries...are an undoubted strengthen of our economy; indeed, they are at the heart of the nation's competitive advantage' (BEIS 2018: 2). Here, various mapping exercises demonstrating the substantial size and capacity of the industries serve as persuasive 'legitimising rhetoric' for policy making (Volkering 2001: 444). The role of state policy appear limited to continuing the existing success and assisting the industries to unlock its potential mainly by addressing failures of the market. Being conscious of the danger of distorting the market and also seeing the government as less good at direct interventions (DCMS 2006), policy makers are interested more in providing the industries with indirect support by enhancing human capital and facilitating positive spillovers of geographical agglomeration. The policy is driven by a network of multiple actors at the centre and region across public and private sectors. Some researchers see the horizontal (and self-) governance embodied in networks as more democratic and flexible as opposed to hierarchy or the market (Pratt 2005). Yet, the heavy reliance on the network is a corollary of the UK cultural ministry's reluctance to directly intervene and its lack of financial and implementational capacity.

The other view of the state's roles vis-à-vis the market that is centred on the embedded construct of the market economy, has been the fundamental basis of Korea's content industries policy. Throughout the period of the country's impressive 'economic catch-up', state intervention was legitimised by the grand narrative of industrialisation and modernisation, where the market was 'merely' a tool for achieving the ultimate policy goal of national economic survival and prosperity. The idea of 'distorting the market' was foreign to Korean policy makers, who believed that state actions – nationalisation of certain industries, supporting select industries, raising national champions, investment coordination, protection of domestic producers and active export support

among many other things – was a pre-requisite for the take-off and expansion of Korea's capitalist market economy (Westphal 1990; White 1988; Woo-Cumings 1999). In addition to the government's prioritisation of 'economic development' over 'the free market', its strong capacity (discursive, financial and implementational capacity that made state policy 'actually happen') and competent bureaucrats autonomous from business sector interests engendered centralised, systematic and exceptionally 'comprehensive' policies (Chung 2012; Lee 2018: Chapter 1).

The rise of neoliberalism since the 1990s has changed Korea's industrial policy, facilitating liberalisation, deregulation and the reform of big conglomerates (Lim and Jang 2006). While the traditional industries became a major target of neoliberal policies, the government began making industry-specific and interventionist policies for 'sun-rise' industries including cultural industries, which was rebranded as 'content industries' in the early 2000s (Chung 2012; Jin 2014; Kwon and Kim 2014; Lee 2018: Chapter 5). What drove this move was the aspiration to convert the national crisis (1997 financial crisis) into a national opportunity. Policy makers saw no inherent contradiction between state intervention and the market economy in the nation-wide effort for 'cultural industrial catch-up'.

'In comparison with advanced economies, the base of our cultural industries is weak therefore government's active support is required to establish industrial infrastructure' (MCT 2002: 11);
'There should be a nation-wide effort to grow content industries as national strategic industry that should lead our economy' (MCST 2011: forward).

Contrasting the UK's approach, the focus has been on the competitiveness of the (national) industries, not that of the regions. Working towards the goal of national competitiveness, none questioned regional gaps or critiqued the concentration of talent and resources in Seoul the capital city.

Remarkably, various laws concerning cultural industries promotion require a formation of 'entrepreneurial state' in a Schumpeterian sense (Mazzucato 2013; Lee 2018: Chapter 5): that is, a state that facilitates activities of private sector actors by identifying new growth areas, taking risks that they cannot dare to take, and actively working as their partner. The term 'entrepreneurial' in this context infers the state's active intervention and investment for industrial growth, thus, this should not be confused with its other uses such as reference to neoliberalisation and privatisation. Alluding to the key industries in each decade that grew under dedicated state support ('steel in the 1960s, automobile in the 1970s, semi-conductors in the 1980s and IT in 1990s were the nation's

pillar industries’) (MCST 2011: forward), the cultural ministry normalises the state’s top-down and proactive intervention into content industries today. For instance, the *Framework Act on the Promotion of Cultural Industries* (1999) specifies state roles in planning and promotion of cultural industries:

The state and local authorities *ought to* make and implement policies to promote cultural industries. The government (cultural ministry) *ought to* create and implement a long-term basic plan and specific plan for each sector per each period. It *ought to* make efforts to nurture human resource, support export, support start-ups, support cultural industries investment funds, and advance cultural distribution. It can support infrastructure and can plan and support cultural clusters (my emphasis).

Despite party politics and government changes from liberal to conservative in 2008, the legitimacy of state direct intervention has seldom been contested. Unlike in the UK, therefore, mapping and evidence gathering as a legitimising rhetoric are not very central to the policy.

Policy options - UK’s creative industries policy

A unique, *local* feature of creative industries policy in the UK is its reliance on a ‘horizontal’ approach aimed to enhance *general competitiveness* of the industries and their overall innovative capacity instead of raising the performance of specific industries. This is aptly demonstrated by the second *Creative Industries Mapping Document* (2001) which set the scope of the policy by identifying ‘generic’ cross-sectoral issues:

Over the past two years the Creative Industries Task Force has investigated *generic issues* which impacted on the creative industries and has made recommendations for change in areas such as skills and training, finance for creative venture, intellectual property rights, and export promotion (DCMS 2001: 4, my emphasis).

These agendas have been taken up by subsequent policy documents. For example, the Creative Economy Programme (CEP) (2005-2006) working group reports looked at generic issues such as evidence gathering, infrastructure, education, IP and so on with a belief that ‘individually the sectors are unlikely to be as important and therefore understanding how to make cross cutting policy is vital’ (DCMS 2006: 11). Being guided by the above report, the ministry announced its

chosen policy options in *Creative Britain: New Talents for the New Economy* (DCMS 2008). This green paper concerned the generic agendas such as education, workforce and skills, knowledge transfer, access to finance, IP, creative clusters and export, while its main focus was education and skills as indicated by its subtitle.

In mid-2010s, the Creative Industries Council (industry-government forum), the Creative Industries Federation (industry association) and the NESTA lobbied the government to recognise creative industries as a sector for state industrial policy. The CIC's *Create UK* report drew attention to the 'five priority areas' including 'access to finance; education and skills; infrastructure; intellectual property; international (export and inwards investment)' (CIC 2014: 3). This was followed by the government-commissioned independent review by Peter Bazalgette, which established key themes for a potential sector deal: creative clusters, innovation, IP, talent, access to finance and export (Bazalgette 2017). Bazalgette took a generic approach but singled out screen industries as a specific sector that needs government investment in relation to its global competition and utilisation of new technologies such as VR and AR. Finally, the government's *Industrial Strategy: Creative Industries Sector Deal* (BIER 2018) has accommodated main recommendations by Bazalgette. It affirms the same themes – places (local clusters), ideas (research and knowledge transfer), business environment (IP, access to finance and export) and people (skills and careers advice) – whilst proposing sector-specific investment on film industry.

Table 1. Legitimising rhetoric and main agenda of creative industries policy in the UK

Year	Key documents/proposals	Legitimising rhetoric and agenda
2001	<i>Creative Industries Mapping Document</i> (DCMS)	'the importance of these industries to national wealth...the continuing success of our creative industries' 'generic issues': skills and training; finance; intellectual property rights; and exporting'
2006	<i>Creative Economy Programme Working Group Report</i> (DCMS)	[No legitimising rhetoric] 'cross-sectoral issues': evidence & analysis; infrastructure (connectivity, clusters); education & skills; technology; competition & IP; access to finance & business; diversity.
2008	<i>Creative Britain</i>	'strong...but...global competition' 'whole creative process': education & apprenticeship; finance & business capacity; creative clusters; IP; export
2014	<i>Create UK</i> (CIC)	'The UK is a world leader...But...an increasingly competitive marketplace' Access to finance; education and skills; infrastructure (connectivity, clusters); IP; International (exports & inward investment); data and evidence
2015	Conservative Party manifesto	'our fastest growing economic sector...contributing...to economy' 'plan of action': reliefs (film tax relief); tax credit for children's TV; IP protection & anti-piracy projects
2015	Labour Party cultural policy manifesto	'powerhouse of a prosperous economy...economic innovation and...social renewal' Increasing the number of apprenticeship; creating a Prime

		Minister's Committee on the Arts, Culture and Creative Industries
2017	A manifesto for the creative industries (Creative Industries Federation)	<i>'key to driving growth in a post-Brexit Britain... we cannot take our global pre-eminence for granted'</i> '10 priority recommendations': Brexit negotiation; visa system; export; creative enterprise zones; business booster network; creative skills commission; creative career campaign; school teaching at least one creative subject; investment in arts; increasing the growth
2017	<i>Independent review</i> (Peter Bazalette)	<i>'central importance to the UK's productivity and global success'</i> 'themes for a sector deal': creative clusters; innovation; IP; access to finance; talent; international , plus screen industries
2018	<i>Industrial Strategy: Creative Industries Sector Deal</i> (BEIS 2018)	<i>'the heart of the nation's competitive advantage...enormous potential...unlock further growth'</i> 'key sector deal policies': places (creative clusters); ideas (R&D, knowledge transfer), business environment (access to finance, business capacity building, export); people (skills & career), plus support for screen industries

Despite government change in 2010 from Labour to Conservative (Conservative-Liberal coalition in 2010-2015 and Conservative from 2015), the policy has been consistently horizontal and fused. There is little concern with the performance of individual sectors or firms whilst the policy is expected to produce positive social and economic outcomes.

The kernel of the policy is *education and skills* programmes. The government's definition of creative industries and its belief that 'original creativity [is] the lifeblood of these industries' (DCMS 2001: 3) hint that state intervention is guided by concerns with 'producers' rather than production, product or consumer. Policy makers understand 'creativity' in a particular way – as an issue of 'human capital' rather than 'labour' (Banks and Hesmondhalgh 2009; Lee 2017; McRobbie 2016: Chapter 3). Their emphasis that '[t]he growth of the Creative Industries is dependent on the quality and range of the available workforce' (DCMS 2006: 76) also reflect the overall tendency that 'the new settlement between the individual and the state is increasingly based on a skills nexus' in post-industrial, neoliberal Britain (Brown et al 2001: 11) and that social and industrial policies are increasingly overlapping with labour market policy. Seldom giving attention to the problems of cultural work such as irregular employment, casualised work and the lack of a social safety net, policy makers are keen on '[p]ositive spillover effect of the creative economy (creatives carry over transferrable ideas and knowledge into other sectors when moving jobs and taking second jobs)' (Bank and Hesmondhalgh 2009: 422).

Aimed at nurturing creativity in school children and preparing young people for their entry into the industries, the chosen policy options since the mid-2000s have included various programmes encouraging them to study creative subjects, linking them to cultural businesses and giving them career advice. For instance, the CEP working group recommended specialist diplomas

in creative and media industries, and knowledge transfer between university and industries among other things (DCMS 2006). *Creative Britain* announced a wide range of schemes on cultural education, young music entrepreneur programme, career advice, creative apprenticeships, as well as the strengthened roles of universities as a creative hub (DCMS 2008). Policy options chosen in the following decade look similar but we can observe some shift from arts and creative education to on-the-job training and career services: teaching of creative subjects at school, skills training, and apprenticeships (Creative Industries Council 2014) and career advice and apprenticeships (Bazalgette 2018). The government's *Industrial Strategy: Creative Industries Sector Deal*'s options under the rubric of 'people' highlight careers programme and apprenticeships in collaboration with industries (BEIS 2008).

The second pillar of the policy is **regional creative clusters** (Flew 2012; Hesmondhalgh et al. 2015; Jayne 2005; Chapman and Comunian; Pratt 2004) as plainly demonstrated by the cultural ministry's call for regionalism as early as 2001 in its second *Creative Industries Mapping Document* (DCMS 2001). This is embedded in the broader context of the UK's regional development strategy under the influence of the knowledge economy discourse and Michael Porter's cluster theory. Compared with the spatial Keynesianism in the previous decades where government intervened to tackle regional prosperity gaps through redistributive investment, welfare payments and demand-led policies (Swords 2013: 373), the cluster approach is an inexpensive intervention focusing on infrastructure, skills, R&D and networks that can be used cross-sectorally. Michael Porter (2000: 262) argues that the positive externalities such as 'spillovers in terms of technology, skills, information, marketing, and customer needs that cuts across firms and industries' captured by clusters 'create a possible rationale for collective action and a role for government'. Meanwhile, he regards industry-specific policy/investment as prone to 'distort markets' and tends to result in 'distorting competition' (p. 263), resonating with the UK government's hesitation about industry-specific policies and direct public investments.

Furthermore, the UK's clusters policy has heavy political implications as regional gaps reflect class gaps in the country, which is often dubbed as the 'North-South divide'. The Department of Trade and Industry's landmark report *Business Clusters in the UK* (2001) not only stressed 'the glowing significance of creative clusters in many parts of the UK' (DCMS 2001: 13) and but also revealed the uneven geography of the nation's creative economy:

For most of creative industries, the position of London is central (and to a lesser extent the South East generally). For most of the creative industries, any regional presence must be

considered embryotic. For one industry in particular (music), the dominant role of London is so extreme that the industry really cannot be considered to exist anywhere else (p. 58).

Interestingly, the heavy concerns with regional gaps led to a conflation between ‘regional creative industries policy’ (i.e. increasing ‘the national competitiveness’ of the industries via regional clustering) and ‘regional development policy’ (i.e., increasing the ‘regional competitiveness’). This is where EU funding dedicated to regional equality worked crucially for developing region-based creative clusters. The enthusiasm about regional clusters was reinforced by Richard Florida’s idea of creative class, policy makers’ experience of culture-led regeneration projects in several cities in the past, and the participation of existing agents and their networks that promote regional approach (Pratt 2009; Prince 2010; Swords 2013). The main actor was the regional development agencies tasked to develop clusters and were given funds.

Both the CEP working group paper and the *Creative Britain* green paper stressed the importance of regional core places, connectivity among themselves and to London and local economies driven by creativity (DCMS 2006, 2008). Despite a huge variety in policies made by different regional development agencies and local governments (Jayne 2005) from mapping to provision of investment, the cluster policy prioritised creative space, networking, knowledge transfer and co-working such that positive externalities are produced and widely diffused. The 2000s was the peak time for cluster policy; however, it has waned under the Conservative-Liberal coalition government (2010-2015). In 2009, Oakley (2009: 408) noted that regional development agencies that previously backed creative industries now reduced their support: ‘The London Development Agency has closed its “Creative Industry” team, in favour of generalised “Business Development”, and “Skills” teams, and ended the funding from many of the interventions it supported as part of its “Creative London” initiative... a practice that many be repeated across the UK, especially as EU structural funding diminishes’. Moreover, the abolishment of regional development agencies in 2010 meant the dismantling of a fundamental structure of regional development in the UK, which was accompanied by continuous cuts to local authority budgets (Swords 2013: 379).

Still, the regional creative cluster has been established as a ‘permanent option’ for UK policy makers, as it fits well with their understanding of creative industries policy as market-friendly, non-interventionist and generic policy affecting all sectors in the industries. The Creative Industries Council (2014: 15) called for a fresh mapping of creative clusters and government support for ‘powerhouse clusters’ in collaboration with the enterprise support agency, local

government, universities, skills agencies, etc. Similarly, Bazalgette's review (2017) called for a five-year 500-million-pound fund for a 'Key Creative Clusters' competition and industries-universities-clusters partnerships for nurturing of creative leaders. The suggestion was taken up passively by the *Industrial Strategy: Creative Industries Sector Deal* that will be implemented with the total budget of a modest 150 million pounds to be raised by both the government and cultural businesses (BIER 2018). The *Sector Deal* allocates only 20 million pounds over the next two years to support local partnerships investing in creative clusters, requiring matching fund from local government, businesses and universities as well as the industries' support for mentoring and advice provision.

'*Access to finance*' is another key agenda for creative industries policy. The cultural ministry's *Mapping Document* (1999, 2001) did not suggest institutionalised public investment while stressing the importance of 'ensuring that creative businesses have access to appropriate financial support, and that the financial sector is aware of the opportunities and benefits of investing in the creative industries' (DCMS 2001: 13). Policy makers viewed the issue of finance as an issue of capacity as the CEP working group report (DCMS 2006) puts:

The obstacle for many firms is not the availability of finance *per se*; rather, it is the capacity to make effective use of funds that would otherwise be forthcoming. Likewise, there exist many different sources of business support for creative businesses; but it is the limited ability of many of these firms to make full use of the advice and expertise that inhibits increased productivity and growth in the creative industries (p. 249).

The UK is not short of is [sic] capital. It is home to some of the world's most mature and sophisticated financial markets...It is difficult to believe that the supposed 'barrier' between investors and creative businesses would be an issue if many attractive investment opportunities clearly existed [...] (p. 251)

They thought that 'there is no apparent deficit in finance...or deficit in the availability of business support services' and the problem is a market failure such as widely spread deficits in 'information', 'capacity', 'business strategy', 'marketing and sales', 'team building', 'time management' and 'ambition for growth' (DCMS 2006: 256-260). Thus the solution would be to guide creative business to use mainstream business support services – rather than sector-specific support – and help them to enhance capacity. This assumption continued into the next decade. The Creative

Industries Council (2014) recommends sorting out ‘information deficit’ or ‘knowledge gap’, believing that ‘there is not necessarily a requirement for more grants or subsidies for the sector’.

Indeed, the UK government has not introduced a sector-specific and coherent investment structure (except the opening of Creative England with an unimpressive budget in 2010, a creative loan scheme funded by Arts Council England from 2012-2017, and some small-scale schemes such as a 4-year Games Fund in 2014 with £1m per annum). It has relied on regional development agencies (until 2010), local authorities, existing agencies such as the Arts Council England and the existing SME support institutions such as the British Business Bank. The Bazalgette review (2017), too, proposes more investment by the British Business Bank into the creative industries and enhancing flows of information on financing within creative clusters. Following this, the *Industrial Strategy: Creative Industries Sector Deal* requests active roles of this bank while promising to help creative firms ‘access’ finance by investing up to £4m (subject to business case) in a programme of intensive business investment readiness support (BEIS 2018: 8).

Policy options – South Korea’s content industries policy

In 1994, the Korean government formally introduced cultural industries policy by setting up the ‘cultural industries bureau’ within the cultural ministry and seriously advocating the monetary value of audiovisual industries. By early 2000s, it established a fundamental and coherent structure for supporting cultural industries, actively inventing its own policy script. Policy makers were fascinated by the ‘creative industries idea’ and looked for inspirations from the UK (Chung 2012: 120-121). Yet, the UK’s creative industries policy worked as an important but ‘rhetorical’ reference point, which hardly guided policy development in Korea. Korean policy makers were not attracted to horizontal approach and nonchalant to ‘creative cluster’, the core component of creative industries policy in China and Taiwan who borrowed both the idea and policy options from the UK. The year 1999 saw the enactment of several important laws requiring extensive roles of the state in cultural industries promotion. Another critical event was the creation of the Korea Creative Content Agency in 2001, which was given a remit to boost the growth of cultural industries and their export.

The cultural ministry, KOCCA and Korean Film Council quickly formed a centralised, coherent and consistent structure for state direct support for the industries. Whilst increasingly involving industry professionals (Chung 2012: 123), their policy was coordinated by ‘hierarchy’ rather than ‘network’ or ‘market’, vividly contrasting the networked and decentralised approach taken in the UK. While the Film Council continued its investment in film production, distribution and export, the newly born KOCCA began delivering unprecedented state support for a wide range

of cultural businesses, which had never been an object of government cultural or industrial policy before. KOCCA's provision of financial support, information and advice has been focused on individual industries in accordance with the ministry's sector-specific long (and short)-term. General/horizontal approaches have been adopted but relevant programmes are firmly targeted at cultural industries, showing little overlap with education, regional or SME policies. This is one of the most remarkable features of Korean content industries policy, which starkly contrasts the policy script in the UK. The following table shows the legitimising rhetoric and core agenda of the policy. But the roles of these key reports are limited to setting broad goals whilst detailed policy measures are specified in numerous industry-specific plans by the ministry.

Table 2. Legitimising rhetoric and main agendas of cultural/content industries policy in South Korea

Year	Key documents	Legitimising rhetoric and agenda
1998	<i>New cultural policy</i> (Saemunhwajeongchaek) (MCT)	'creating a system to substantially develop cultural industries': cultural laws; state investment & stimulating private investment; industry-specific infrastructure; human resource; export
2000	<i>Cultural industries vision 21: cultural industries promotion 5-year plan</i> (Munhwasaneopbijeon 21) (MCT)	'developing cultural industries as nation's strategic industry' & <i>cultural industries catch-up</i> : sector-specific support (cluster, infrastructure, finance, technology, human resource and export)
2001	<i>Content Korea Vision</i> (MCT)	'national competitiveness...becoming a cultural/knowledge power': laws; production; infrastructure; technology; export; human resource; industry-specific support programmes
2004	<i>Creative Korea</i> (Changuihanguk) (MCT)	'cultural industries catch-up (becoming the world 5 th largest cultural power)': infrastructure (human resource, technology, finance); production and distribution; markets (domestic and overseas)
2005	<i>C-Korea 2010</i> (MCT)	'cultural industries catch-up (becoming the world 5 th largest cultural power)': developing cultural market; enhancing cultural distribution; infrastructure for IP industries, nation branding
2011	<i>1st Content industries Promotion Basic Plan</i> (Je 1cha kontencheusaneopjinheung gibongyehoek)(CIPC)	'content industries catch-up (becoming the world 5 th largest cultural power)': pan-national support system for content industries (especially investment); employment; global markets; healthy ecology; strengthening production, distribution and technology
2014	<i>2nd Content industries promotion basic plan</i> (Je 2cha kontencheusaneopjinheung gibongyehoek) (CIPC)	'driving creative economy via content industries development': investment and loans; start-ups and human resource; export; healthy ecology; competitiveness of industries

2002-2016	<i>Content Industries White Books</i> (KOCCA)	<p>‘great leap of cultural industries’, ‘catch-up with advanced nations’, ‘culturally powerful nation’, ‘global competitiveness of content industries’</p> <p>Horizontal approach: cultural investment, export, copyright</p> <p>Industry-specific policy: targeted at film, TV, animation, music, games, comics, character, publishing, advertising, fashion, etc.</p>
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Unlike the UK’s creative industries notion grounded on the abstract idea of human creativity, the Korean equivalent – cultural (content) industries – works as a concrete and practical policy term. With an emphasis on tradable outputs (product), it seldom triggered definitional debate, and an economic consensus on culture has been easily formed among policy makers as well as media. According to the *Framework Act on the Promotion of Cultural Industries* (1999):

Cultural industries refer to the industries related to the production, distribution and consumption of cultural commodities including industries related to film, music recording, video, games, publication, printing, serial, broadcasting programme, cultural heritage, character, animation, design (excluding industrial design), advertisement, performance, artwork, traditional craft, multimedia content, traditional costume, and traditional food.... Cultural commodity refers to goods, services and their combination that create economic added values by embodying cultural elements.

In 2003, a revised version of the law formally introduced the notion of ‘content’ that was technically defined as ‘data or information of symbol, text, voice, audio and screen image’.³ KOCCA’s remit shows the inclusiveness of the boundary of content industries: any industries producing ‘content’, such as film, TV, comics, animation, music, games, educational content, etc. The idea of content essentially dis-embeds and de-localises culture and transforms it into ingredients for making sellable and exportable cultural commodities. The state-led discursive exercise has effectively turned culture into what Karl Polanyi (2001[1944]) calls a ‘*fictitious commodity*’, things that are not produced for sale but are treated as if they are commodities for the capitalist market economy to function (e.g., land, labour and money). Culture (in the form of

³ The preferred term at the beginning was ‘cultural content industries’. Chung (2012: 128-129) explains that the choice of this term was a consequence of the competition between the cultural and information ministries for the ownership of policy for the then rising digital (online) media and cultural content. The term was intentionally chosen by cultural bureaucrats, as opposed to ‘software’ preferred by the information ministry. Thanks to the political power of the ‘strong’ cultural minister and the enthusiastic backing of the president, the cultural ministry was bestowed with power and resource to make cultural industries policy. Overtime, the term ‘content industries’ has gained currency.

‘content’) has now become as an essential commodity for the operation of the new, knowledge-driven economy in post-industrial Korea. This is compared with the UK where definitional debates evoke the complex nuance of the idea of creativity and China where the terms ‘culture’ and ‘creativity’ cannot be bluntly reduced to a commodity due to their association with politics and artistic/individual freedom respectively (Keane 2013: 36-43; O’Connor and Gu 2006).

The discursive commodification of culture is deepened by the state-led creation of ‘markets’ for trading content: such as the Scenario Market (2005-), Content.com (2005-) and Storyum (2016-). They were launched by the Film Council and KOCCA as centralised online marketplaces for film scenarios, digitalised contents and stories respectively to facilitate trades between anonymous sellers and buyers, who interact without gatekeepers or intermediaries. Yet, the two agencies provide various training and support to sellers, offer model contracts, implement copyright protection measures, mediate sellers and buyers, assist overseas pitching and run specific programmes in collaboration with big media companies such as Naver (Donga 2018). Although it is doubtful if these markets are successful, they are interesting experiments showing the Korean government’s keenness to explore the market model via a heavily interventionist approach.

The second core aspect of the policy is its *industry-specific support in almost ‘all’ stages of the industry’s value chain*. Although cross-sectoral approaches are taken for generic agendas such as basic infrastructure, technology and copyright, the Korean government has chosen a set of sophisticated policy options to ‘push’ individually identified industries to increase their capacity, productivity and export potential. The games industry policy is a good example. Here, we can find the taken-for-granted concentration of policy making power and resources by the cultural ministry and KOCCA as well as the geographical concentration of incubating space in Seoul. Working as a one-stop policy maker/service provider, KOCCA aims to increase the ‘global competitiveness of the industry’, which is compared with the UK policy makers’ consistent concern with achieving ‘the competitiveness of regions’ via the decentralised cluster policy. Scarcely interested in discussing market failures, policy makers are enthusiastic about setting an ambitious, national target (e.g., Korea’s becoming the world third largest games economy) and ‘push’ the industry via support programmes. It is revealing that every January, policy makers organise an annual ‘strategic seminar’ where they share a sense of common vision of games industry development with industry stakeholders.

Unlike the UK’s preference of ‘sparse policy’, Koreans opt for a ‘dense policy’ that touches on every aspect of the games business, from ideation, production, marketing to export with

numerous specific programmes. For example, the following summarises key activities of KOCCA (its Global Games Hub Centre):

Incubating (incubating new generation games and mobile games developers); supporting games production; supporting pre-production of excellent games; supporting games R&D; organising events for potential investors; organising job fairs, managing ‘Games Academy’ (which provides accredited qualifications for 2-year full time education); developing, standardising and disseminating games education curricula; supporting Korean game producers’ overseas training; collaboration with universities domestic and overseas; organising annual investment events (in China, Japan, Europe and North America); annually showcasing Korean games at prominent overseas games shows; organising the Korea Game Conference (from 2004); organising G Star (international games exhibition) (from 2005); initiating the World Cyber Games (from 2001), the largest global e-sport tournament; operating an online platform for global games service; organising annual export event to inform companies of export opportunities (including meetings with overseas buyers); supporting the localisation of Korean games (e.g., translation, testing local equipment, and business matching); holding various domestic competitions (excellent games, excellent scenario, Korean games prize, etc.); holding the global indie games production competition; holding global games camps in select countries; hiring managements specialists for potential exporters of mobile games; regularly organising seminars on overseas markets (see the Games Industry section in *2002-2015 Content Industries White Books*)

A recent development is KOCCA’s ‘global online platform’ consisting of a main server in Korea and a download server in the US, UK, Germany, Japan and Singapore. This platform allows selected domestic games companies to provide online games service directly to overseas users without middlemen. KOCCA looks after the maintenance of these servers, overseas marketing, games management service, online payment service and so on. Its ambition is to create overseas markets by directly offering a global games transmission infrastructure: again, ‘market creation’ – rather than ‘market failure’ – works as a powerful rationale for such interventionist and hands-on policy.

Another crucial policy option is the *state investment in cultural businesses*, which began in late 1990s, with the cultural ministry directly partnering with commercial investment funds to create

culture-specific public-private investment funds. The starting point was the government's recognition of the lack of financial resources available for these industries:

Cultural industries are...high value-added industries....[and] new growth industries, however, there is an absolute lack of financial resources for them. These industries are still at the stage of industrialisation so *they cannot produce competitive cultural contents without the government's consistent investment*; and this means that Korean cultural industries face difficulties in competing in the global market (MCT 2003: 17, my emphasis).

Thinking that 'minimum financial input can result in maximum return' (MCT 2003: 19), the Korean government has firmly committed to state investment in cultural industries. While public spending on the ministry, Film Council and KOCCA's extensive programmes (both generic and sector-specific) need no legitimising rhetoric other than 'cultural industrial catch-up', the ministry's input into the public-private investment funds are often justified with a reference to market failure, such as the lacking of initial capital investment, low capital turnover and high-risk in cultural production (MCT 2002: 629; MCST 2009: 104).

In 2006, the ministry's funds were transferred to the *Motae Fund* (Fund of Funds) under the the country's SME ministry. Cultural and film accounts of the *Motae Fund* have created several dozens of public-private investment funds of a 4-7 year expectancy, which are professionally managed by commercial fund managers. The number of funds has consistently increased as a substantial amount of money is injected by the cultural ministry every year (Lee 2018: 107-110). These public-private funds invest in a range of areas of cultural industries, especially film and games – whilst their return ratio varies with the average being under 100% (Yonhap News 2017), aptly showing the risky nature of cultural business. The use of those funds looks like a financialisation of government spending, and thus a symptom of neoliberalisation. However, we should consider it as an example of the Korean state's active manoeuvring of financial capital in order to achieve state policy goals, and thus an evidence of the bounded neoliberalisation of cultural policy. What is still puzzling is that the tightening of the culture-economy nexus facilitated by financial capital is robustly underpinned by the strong and capable state.

We can find uses of financial instruments for publicly support for cultural industries elsewhere: for example the UK's regionally-based public venture capital funds (or such programmes) available for creative businesses, France's IFCIC (a public credit institution providing loans and loan guarantees to cultural businesses) and tax benefit for SOFICAs (private investment

funds specialising in film and TV production), and creative finance (loan guarantee) schemes in the UK and EU. In comparison, Korea's public-private investment funds are noticeably susceptible to government policy agendas although they are professionally managed. The cultural ministry regularly launches new funds (which attract private money) and earmarks them for certain areas of cultural industries. Its use of financial instrument is hardly about giving a way to market forces. Yet the ministry itself is keen on investing in the production of exportable cultural commodities while showing limited concerns with less non-mainstream production. Hence, we can conclude that although the market mechanism is embedded in active state policy, the policy itself is tightly guided by economic, not cultural, reasoning.

Finally, we can observe the quick *rise and fall of the 'creative economy' policy* – as a 'government policy' rather than 'state policy' – in recent few years. The idea of 'creative economy' arrived in Korea in 2013 with the election of a new conservative president Park Guen-Hye (2013-2017). This sounded proximate to the UK's creative industries idea but it in reality referred to R&D and technology industries. This is why the government looked at the R&D industries in Israel, not the UK, to gain inspiration. Park's understanding of creative economy was a construct drawing on heterogeneous ideas such as the new economy, R&D start-ups and 'creativity'. Koreans were puzzled about the meaning of creative economy as it sounded too abstract and inclusive. At the end of definitional debates, however, what emerged clear was the government intention to boost the nation's post-industrial economy by investing on technology-centred industries, especially start-up businesses. This meant that cultural policy should show affinity with new technologies to take advantage of the shifting policy environment. An evidence of this is the creation of new public-private investments focusing on converging digital and ITC technologies, start-up business and production of exportable content under Park's presidency. Another example is the establishment of several Content Korea Labs, where convergence between different cultural forms, arts and technologies are experimented and transformed into business opportunities (CIPC 2014: 20-22).

However, the creative economy policy and associated rhetoric disappeared with the fall of Park caused by the revelation of her abuse of power and wrongdoings that led to her impeachment in early 2017 (BBC 2017). The following liberal government (2017-2022) immediately dropped the term 'creative economy' and began promoting new policy rhetoric such as 'the 4th industrial revolution' and 'innovative growth' as fresh descriptor of national economy. Still, its cultural policy plan for 2018 backs the existing policy options with focus on incubation, start-up support, public-private investment funds, investment on R&D and culture technologies and export support (MCST 2018). The sudden fall of 'creative economy' policy has not seriously affected content industries

policy which prospers as a ‘state policy’, a policy that is grounded on Korean society’s economic consensus of culture, which goes beyond party politics.

Conclusion

Comparing creative industries policy in the UK and content industries policy in South Korea is an interesting way to make sense of divergent approaches in the nation state’s dealing with the cultural turn in economy. Assuming passive, indirect, decentralised and mainly discursive (PR) roles (McRobbie 2016: 67) and addressing market failures, UK’s liberal state has opted for a horizontal, fused, sparse and region-oriented policy. Contrastingly, the interventionist Korean state, which is keen on creating cultural markets and actively managing cultural globalisation by turning it into an opportunity for cultural export, has formulated an industry-specific comprehensive policy focused on the national competitiveness of those industries. These findings encourage us look beyond the framework of policy transfer and, instead, comprehend policy development from the broader institutional and comparative perspectives. They also assist us to readdress the existing temporal and spatial structure in scholarly accounts of creative industries policy and expand our repertory of analytical tools to explain the rationales and options of creative (content) industries policy in the real world.

I propose that contemplating the ‘paradox’ in policy development in both countries will be an important – and fascinating – way to further articulate the complicated dynamics in the culture-state-market nexus. Despite its neoliberal undertone, the UK’s horizontal and fused policy seems to engender some space for ‘cultural’ policy agendas such as cultural education, access, inclusion and equity. Meanwhile, the effectiveness of state-driven content industries policy in Korea is underpinned by a stronger tendency of cultural commodification. This finding draws our attention to the embedded nature of the capitalist (cultural) economy itself (Polanyi 2001[1944]) and calls for more nuanced discussion on the roles of the state in mediating culture and the market. At the same time, I suggest that we revitalise discussion on the ‘cultural’ consequences of creative (content) policy. Can the space for cultural (and social) agendas, which is found in the UK’s liberal creative industries policy, bind the policy back to cultural policy? How can the Korean society negotiate with the narrowed, economy-centric cultural outlook caused not only by its observation of the success of cultural industries but also by the normalisation of the consistent application of statist industrial policy to these industries? This question seems more urgent.

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